

CollegeChoice Advisor Plan
Style Guide





Table of Contents

- 1. Introduction to the Guide — Page 3
- 2. Brand Name — Page 4
- 3. Brand Positioning — Page 5
- 4. Brand Tone and Voice — Page 6
- 5. Logo — Page 7
- 6. Color Palette — Page 10
- 7. Typography — Page 11
- 8. Imagery and Visual Design Elements — Page 12
- 9. Sample Materials — Page 13

1. Introduction to the Guide

This guide defines the elements that communicate the 529 plan's copy style and graphic identity.

Use this reference piece when you are planning, writing, designing, or reviewing materials related to the **CollegeChoice Advisor 529 Savings Plan**. It shows the acceptable colors, fonts, and layouts that meet the plan's brand guidelines.

Meeting these standards will ensure a consistency across all **CollegeChoice Advisor** communications — whether print, email, or website — that will foster a sense of familiarity and security to its audience.

2. Brand Name

Official name

CollegeChoice Advisor 529 Savings Plan

Short name

CollegeChoice Advisor

Tagline

No official tagline

NOTE: There is no space between “College” and “Choice.”

3. Brand Positioning

The theme of CollegeChoice Advisor is “looking to the future.” Images show a child excitedly looking at the distance. They may be looking at something interesting, but we, as the viewers, know that their future is what’s really ahead of them and interpret their excitement as the unbounded opportunities that they’ll encounter.

Emphasizing the role of the advisor

Since this is an advisor plan, CollegeChoice Advisor is positioned as a partnership between an advisor and the parent/grandparent/client. The advisor is a trusted ally who can help parents make good decisions in setting up this fund for the future. Therefore, the advisor should be referenced in pieces, using the benefits of a financial advisor throughout.

4. Brand Tone and Voice

CollegeChoice Advisor helps families save for their children's future education. The Plan voice is:

- **Optimistic:** Write with a positive, can-do attitude. Encourage families to do the right thing — start saving for higher education now.
- **Aspirational:** Believe to reassure parents that their children can have a good future — and that higher education is key to that future. Whether a child attends university, college, community college, or trade/vocational school, if a family puts a savings plan in place now, they can help their child achieve his or her educational goal.
- **Straightforward:** Write clearly, without jargon or acronyms. Try to make complex financial concepts easy for families to understand.

Writing style

- Keep it short and simple
- Make your copy clear, helpful, and accessible
- Keep in mind phrases that might trigger large amounts of disclosure
- Write from the parents' point of view
- Use bulleted lists whenever possible to avoid long paragraphs

5. Logo

While internal constituents will quickly become familiar with the CollegeChoice Advisor logo, familiarity and recognizability must be cultivated among external audiences. It is imperative that the logo and signature never be used independent of the other.



Logo Colors

The logo and signature may be used only in the following approved colors.

2 color

CollegeChoice**Advisor**
529 SAVINGS PLAN



Pacific Blue



Petal Orange

Black & white

CollegeChoice**Advisor**
529 SAVINGS PLAN



Black

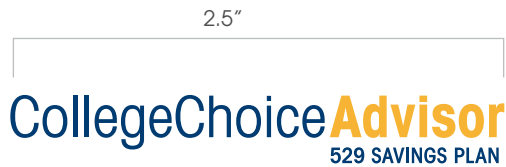
Knockout on dark color

CollegeChoice**Advisor**
529 SAVINGS PLAN



Logo Size Requirements

To emphasize the importance of the CollegeChoice Advisor logo and aid in its visibility, it can appear no smaller than indicated here.



Logo Clean Space & Placement

Clear space ensures a logo's visibility, and creates an area around the mark that must remain free of text, photos, or other design elements that would obscure it.



Logo Scaling

Use only authorized electronic reproductions of the logo available from your marketing director. When using electronic versions, be sure to not alter the logo's proportions. Always scale from lower right corner for proper proportions.

Correct



Incorrect



Proper Logo Usage

- Always use the logo's original artwork.
- Do not rebuild, re-draw, re-create, or distort the logo.
- Do not use the logo as a design element—i.e., rotated, cropped, etc.
- Do not insert the logo in headlines or body copy.
- Do not use the logo in a graphic element—i.e., within a box, circle, etc.

Correct

CollegeChoice**Advisor**
529 SAVINGS PLAN

Incorrect



Incorrect



6. Color Palette

We have selected colors that suit the **CollegeChoice Advisor** brand personality and make the brand readily identifiable. Because we want to reinforce our identity at every opportunity, no other colors are permitted. Screens of these colors are ok.

Core palette

The **CollegeChoice Advisor** corporate colors are PMS 541 and PMS 143. They are the approved colors for the logo, and it is part of our overall brand palette.



Pacific Blue

PMS: 541

CMYK: 100.58.9.42

RGB: 0.63.114

Web: 003f72



Petal Orange

PMS: 143

CMYK: 0.32.86.0

RGB: 238.173.48

Web: eeaf30

Additional palette

The following colors should be used in print and electronic materials.



Basketball Orange

PMS: 1595

CMYK: 0.72.100.3

RGB: 213.92.25

Web: d55c19



Safari Tan

PMS: 7503

CMYK: 10.15.45.28

RGB: 211.191.150

Web: d3bf96



Lime Green

PMS: 383

CMYK: 26.3.93.17

RGB: 162.173.0

Web: a2ad00



Dusty Blue

PMS: 5425

CMYK: 44.15.7.22

RGB: 125.154.170

Web: 7d9aaa

7. Typography

As with other CollegeChoice Advisor brand elements, the consistent use of typography contributes to the CollegeChoice Advisor brand's unique look and feel, making it easily distinguishable from competitors. The use of other typefaces is not permitted. The typefaces that may be used for CollegeChoice Advisor materials is ITC Avant Garde Gothic.

Print typography

ITC Avant Garde Gothic

These typefaces are to be used in all communications—advertising, literature, signage, premiums, etc.

Digital typography

In electronic communications (Web, PowerPoint®, etc.), CollegeChoice Advisor uses:

Helvetica

Colors

Body copy color should never be K at 100%. **Please use K at 85%.**

Header/subhead typeface

ITC Avant Garde Gothic Bold
ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz
1234567890

Body copy typeface

ITC Avant Garde Gothic Book
ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz
1234567890

ITC Avant Garde Gothic Medium
ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz
1234567890

8. Imagery and Visual Design Elements

The following examples show the type of imagery that should be used. Imagery can never be a silhouette on a white or colored background. The images should be of children looking into the distance/ looking towards their future. There is also a visual element of a color block as an arrow that can be used on images, along with arrows to highlight important copy.



Print materials

College Savings


Do you want the best for your children? Whether they're parents, grandparents, relatives, or friends, we want to do all we can to help children reach their future potential. College can be the best that each generation has to offer.

We created the CollegeChoice Advantage 529 Savings Plan ([CollegeChoice Account](#)) to help families like yours have a smart, easy way to save for college. The Plan offers a number of valuable benefits:

- Tax advantages/Investing
- Professionally managed investment options
- A special tax credit for Indiana taxpayers
- Incentive programs to help you save even more, like [UGMA](#)[®] / [Gifts](#) / [College Savings](#) and [Uppstart](#)[®]

Our children deserve the best possible start in life. Saving for college can be a daunting task, but with CollegeChoice Advantage, you'll have a plan in place that can help bring that important goal closer to reality.

Discover...



Richard Mourdock
State Treasurer of Indiana

Fast forward

Over the past decades, tuition and fees at public (but your colleges and universities included) at an average rate of 8.6% per year topped the rate of general inflation.

Source: The College Board, [Trends in College Pricing, 2010](#)

Their future is filled with unlimited potential

Tomorrow's college education requires careful planning today. You've made a good choice in atting down with your financial advisor now. Whether your child will be ready in 10, 15, or even 15 years, the future is in that for off.

A smart way to save

A 529 plan account offers you, as the account owner, control over your account. Tax-deferred earnings, and professionally managed investment options. But one of the most significant benefits of a 529 plan offer federal and state tax savings/withholds for qualified education purposes/benefits, fees, books and certain items on board cost of eligible institutions anywhere in the country.*

As you can see in the chart below, is a 529 account can lead to more money when you need it than a taxable account – in this example, potentially almost \$2,000 more!

Year	Tax-deferred 529 plan	Taxable investment
0	\$10,000	\$10,000
1	\$10,500	\$10,500
2	\$11,000	\$11,000
3	\$11,500	\$11,500
4	\$12,000	\$12,000
5	\$12,500	\$12,500
6	\$13,000	\$13,000
7	\$13,500	\$13,500
8	\$14,000	\$14,000
9	\$14,500	\$14,500
10	\$19,000	\$17,000

*For federal purposes, the tax advantage of 529 plans for tax paid and/or on the day of a college education.

Assumptions: 10,000 initial investment with subsequent monthly investments of \$100 over a period of 10 years; annual rate of return on investment of 5%; no funds withdrawn during the time period specified; and taxpayer in the 30% federal income tax bracket for all of the years of contributions and withdrawal. This hypothetical is for illustrative purposes only. It does not reflect an actual investment in any particular 529 plan or any other specific investment option. Actual investment results may be higher or lower than those shown.

*Earnings on non-qualified withdrawals are subject to federal income tax and may be subject to a 10% federal penalty tax, as well as state and local income taxes. The availability of tax or other benefits may be contingent on meeting other requirements.

8 CollegeChoice Advantage 529 Savings Plan | 1.866.465.3133 | collegechoiceinvestments.com

Here are just a few ways in which a CollegeChoice Advisor 529 Savings Plan account can help you save—while you invest in your future student

Use your CollegeChoice Advisor account to...

- ☒ **✓ Cover your losses**
Investing your losses goes deflated, so your money can work harder than it can in a taxable account. And when you withdraw the money for a qualified, education-waived expense, you don't pay dividend or stock taxes on it.*
- ☐ **Get a state tax credit**
Indiana taxpayers can eliminate for a state income tax credit 25% of contributions to CollegeChoice Advisor accounts that are made each year. The credit is equal to 10% of each year's contributions.
- ☐ **Invest automatically**
You can choose to have your salary paid to CollegeChoice Advisor contributions on automatic. It's easy to set up an Automatic Investment Plan (AIP).
- ☐ **Put your own refund to work**
If you get a tax refund, put it in your CollegeChoice Advisor account and invest in it a student's future.
- ☐ **Eliminate a gift**
You can eliminate up to \$10,000 in gifts/annual \$5,000 if may be made without incurring a gift tax. This money may be used to take advantage of accelerated gifting by making a gift to the "first" worth of gifts (\$5,000) and then \$10,000 in additional, being gifting only at one time without incurring a gift tax.
- ☐ **Attain any eligible school**
Your account's assets can be used at any eligible institution across the country, not just in Indiana. This includes K-12 or even colleges, graduate schools, vocational schools, or technical institutions.

And don't forget to...

- Use your financial advisor's expertise for even more helpful suggestions on how to reach your college savings goals.**
Together, you can help make the dream of higher education a reality.
- Invite family and friends to help save for college with Ulight 529—Give College Savings the Gift of Love.**
Create a way to invite family and friends to contribute to your CollegeChoice Advisor account in place of a traditional gift. It's a perfect way to get your social network's collective milestones with you in the most lasting present possible that may ever increase—the gift of college savings. Use Ulight for birthday, wedding celebrations, holidays, or any special occasion!

Website

